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Trends 2010: A decade of change in European Higher Education

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Executive Summary

INTRODUCTION: THE SCOPE OF THE REPORT

1. The aim of the *Trends 2010* report is two-fold. Firstly, to situate and analyse – from the viewpoint of higher education institutions – the implementation of the Bologna Process in the context of the much broader set of changes that have affected higher education in Europe in the past decade. Secondly, to propose an agenda for the future of both the Bologna Process and the EHEA.
2. The report is based on a unique longitudinal analysis of responses to two survey questionnaires to higher education institutions (821 responses) and national rectors' conferences (27 responses), which have been compared to *Trends III* (2005) and *Trends V* (2007) results. The quantitative data were supplemented with qualitative data collected through 28 site visits in 16 countries, two focus group discussions and five semi-structured interviews of regulated professional organisations.

PART I: THE BOLOGNA PROCESS IN CONTEXT

3. Higher education has been affected by a number of changes in the past decade, including higher rates of participation, internationalisation, the growing importance of knowledge-led economies and increased global competition. These changes have resulted in two main European policies: the Bologna Process and the Lisbon Strategy, including the Modernisation Agenda for Universities.
4. Both these broader international developments and the two specific European policy processes have been translated into policy change at national level affecting principally external quality assurance, autonomy, funding and research but also the shape and size of many higher education systems. These fundamental changes, along with the implementation

of the core Bologna reforms, have altered deeply all activities of HEIs, and their partnerships with other HEIs and with their stakeholders, and have at the same time increased their strategic capacity and their professionalism.

5. The Bologna Process has been increasingly embedded in this wider set of European and national policies. Where other national policy changes are at work, the Bologna Process adds yet another layer to a sometimes heavy change agenda. These changes, including those inscribed in the Bologna Process, are deep and significant, often requiring changes in attitudes and values, and always requiring effective institutional leadership. They are time and resource consuming, especially on staff members. Explaining the purposes of the reforms and convincing staff members of their benefits remains a major challenge and crucial to success.

PART II: EUROPEAN HIGHER EDUCATION INSTITUTIONS IN THE BOLOGNA DECADE

6. Higher education institutions and national rectors' conferences continue to be committed to the creation of the European Higher Education Area (EHEA), which they view as being globally positive and beneficial to students and institutions. The Bologna Process has introduced unifying elements that are shared by institutions across 46 countries although the diverse cultural, national and institutional contexts have led to considerable variety in implementation.
7. The Bologna Process has been characterised by a series of 'action lines' and tools that have been developed over the years to make the EHEA a reality and to ensure the realisation of a number of underlying objectives (e.g. mobility, quality and social

agenda). Although the Bologna tools and action lines are interlinked, this has not necessarily been clear to institutional actors because of the evolving nature of the policy agenda.

Degree structures and their acceptance by the labour market

8. A large majority of institutions have implemented the new Bologna degree structure: from 53% of institutions in 2003 to 95% in 2010. In some cases, however, the change has not led to meaningful curricular renewal, but rather to compressed Bachelor degrees that leave little flexibility for students.
9. A range of measures which affect both teaching and learning are being implemented in order to enhance the student experience. These can be seen at all three levels. At the Bachelor level there is a greater emphasis on increasing and widening access, on student-centred learning and on flexible learning paths, with the attendant need for more and better targeted student support services. At the level of the second cycle, the Master degree has been introduced as a new, separate qualification across Europe in the last decade. This has proved to be a very flexible degree, albeit one that is defined differently depending upon national and institutional contexts. At the Doctoral level, the last decade has been characterised by the rapid expansion of Doctoral schools and more attention is being paid to the supervision and training of Doctoral students.
10. Employability has moved increasingly to the forefront of concerns at all levels and poses particular challenges at Bachelor level. It is difficult to assess employers' acceptance of these new first-cycle qualifications because the first graduate cohorts are recent, few institutions track their alumni's employment, and the ISCED 5 band still aggregates the Bachelor and the Master thus hindering detailed statistical analyses of employment patterns. There are strong indications, however, that many institutions expect their Bachelors to continue to the Master's level. Employers seem to accept Masters and Doctorates with relative ease.

Building flexible curricula: tools for implementation in institutions

11. There is some progress in shifting to modularisation, learning outcomes and to student-centred learning but this paradigm shift requires further resources to support smaller student-staff ratios, adapted classrooms and staff development.

12. Implementation of ECTS continues to spread but is not always used for both transfer and accumulation. Use of the Diploma Supplement is growing but it seems to be relegated to an administrative function and disconnected from new developments such as learning outcomes and qualifications frameworks. These must be integrated in the Diploma Supplement, as recommended in the 2007 amended guidelines, and it must engage academics.

European frameworks at system level

13. Progress is being achieved in developing national qualifications frameworks (NQF) but institutions' understanding seems low particularly with respect to the importance of learning outcomes and of their central role within qualifications frameworks and in facilitating mobility and lifelong learning (through RPL). There have been some rare and very successful efforts, at national level, to delegate to institutional actors, through their rectors' conferences, the task of discussing (but in some cases also developing and implementing) NQFs.
14. Almost all Bologna signatories have QA agencies or have reformed their QA approaches, but without necessarily making explicit the link to the European Standards and Guidelines (ESGs), or taking into account the enlarged scope of institutional autonomy and the expressed need of HEIs to be more strategic and contribute effectively to the knowledge society. In this context, several national QA trends are worth noting. These include the predominance of QA at the programme level, the accumulation of QA procedures, and the spread of accreditation. Institutions respond primarily to their national external quality requirements and these have not always stressed the responsibility of HEIs in this area. Finally, relatively few rectors' conferences seem involved in national QA developments.
15. The ESGs and the European Quality Assurance Register (EQAR), both developed by the 'E4' group of stakeholders, have had a positive impact, primarily in internationalising the review panels, ensuring the participation of students, and further professionalising QA agencies. To ensure more effective implementation and commitment, it is critical that the ownership of the ESGs continues to rest with the stakeholders. Responsibility for any revision of the ESGs must continue to lie with the E4 Group.

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Responding to the challenges of lifelong learning, widening participation and access

16. In the majority of European countries, lifelong learning is considered as a set of activities provided outside mainstream education, in relation to which Bologna tools such as learning outcomes and academic credits are only rarely defined or attached. Therefore, there is a clear need for European HEIs and national authorities – together – to connect policies in order to create accessible, flexible and transparent student-centred learning and to monitor and evaluate implementation continuously. This is necessary in order to ensure that all education provision is seen within a lifelong perspective and in specific national, regional, local and institutional contexts. The joint approach advocated in EUA's Lifelong Learning Charter, requiring the joint commitment of governments and HEIs, is essential in order to achieve success. It will also be important to act together at regional level and promote cooperation between regional stakeholders, including employers and HEIs.
17. *Trends 2010* data show that an increasing number of European HEIs have begun to rise to the challenge of attracting and teaching a more diversified student body, and to introduce institutional policies which are more inclusive and responsive. To enhance further the development and the potential success of the social dimension of the EHEA it will be vital for both national authorities and HEIs to be able to collect data on the social background of students and their attainment.

Internationalisation

18. Internationalisation has been identified by HEIs as the third, most important change driver in the past three years and is expected to move to first place within the next five years. More institutions are developing an integrated internationalisation approach to teaching and research through a focus on strategic

partnerships. However, it is yet unclear whether this strategic approach will prevail over the more traditional form of 'bottom up' cooperation initiated by individual academics.

19. The priority geographical areas for international exchange have not changed much since *Trends V* (2007). The EU and Europe more generally remain the first and second choice; Asia keeps its third place; the US and Canada their fourth place and Latin America the fifth. The Arab world and Africa remain the lowest priority areas for higher education institutions across Europe, followed by Australia which has been losing ground since 2003.
20. Given the current limitations of mobility data, tentative conclusions regarding student mobility can be drawn based on the *Trends 2010* survey: institutional expectations regarding short-term mobility seem to have remained stable while the expectations for full-degree (vertical) mobility seem to be growing; the imbalance of mobility flows between East and West has remained unchanged since *Trends III* (2003). The report provides a rich documentation of institutional experience regarding obstacles to mobility which include visa or language requirements, compressed degrees, lack of funding, lack of harmonisation of academic calendars across Europe, etc. However, mobility, particularly as a period of study abroad during the Bachelor, will remain a challenge unless it is central to the institutional internationalisation strategy.
21. Recognition of credit transfer is a central issue in the promotion of mobility and one of the core Bologna action lines. *Trends 2010* results show minimal improvement over the decade except when recognition of study abroad periods is a centralised function in institutions. This leads to fewer problems, probably because centralisation provides a consistent and coherent way of dealing with credit transfer.

Conditions for proper implementation in institutions: student services and internal quality

22. The importance of student services has been relatively ignored as policy priority throughout the Bologna decade even although it is central to the shift towards a student-centred approach and to a stress on student attainment. The *Trends 2010* questionnaire data on this topic and the site-visit reports suggest that career guidance is the fastest growing area, followed by growth in psychological counselling services. This indicates that the focus is moving, to a certain extent, from providing student guidance primarily during the pre-admission phase to improving student retention and preparing students for employment.
23. The organisation of student services vary: in some countries, these responsibilities are shared by a variety of bodies, thus requiring good collaboration at national, regional and local level. As their primary responsibility HEIs need to ensure that students have access to the services they need. It is also incumbent upon institutions to establish local and national links where necessary, e.g., by pooling resources with other HEIs and cooperating with national and local bodies and student organisations that have responsibilities in this area.
24. For 60% of HEIs, one of the most important changes in the past ten years has been enhanced internal quality processes. This is true particularly for institutions that are interested in European partnerships and those that deliver the Doctorate. The site visits confirm that many quality procedures are in place, often managed at faculty rather than at institutional level. As a result, there is wider ownership of quality processes and the concept of quality culture is reaching down. However, there is not always a clear feedback loop to the institution's strategic orientation. In addition, while staff development measures to improve teaching are in place in many institutions, these are not found everywhere. Thus, while good progress has been achieved, internal quality needs to be approached in a more integrated and comprehensive fashion.

Bologna Process: key challenges

25. Looking back over a decade of reform, it is clear that a great deal of progress has been made in the field of higher education but that the rapid implementation of

'Bologna tools' peaked around 2007. The next phase will be to deepen the change process by creating new organisational cultures. This means using the existing architecture, quality infrastructure and the Bologna tools more broadly at national and institutional level while situating them clearly within institutional and national priorities, and resource constraints.

26. The Bologna Process should be regarded as means to an end: its main goal is to provide the educational component necessary for the construction of a Europe of knowledge within a broad humanistic vision and in the context of massified higher education systems; with lifelong access to learning that supports the professional and personal objectives of a diversity of learners.
27. The different elements of the Bologna reforms have evolved through time, and have sometimes led to a fragmented and instrumental view of education that has not always facilitated understanding in institutions of the important links between the various elements. This can be improved if the tools are seen as being interconnected, and as a means of moving towards student-centred learning.
28. Greater – coordinated – communication efforts are needed. They should be centred on the benefits of the reforms to students, academics, employers and society at large.
29. Data collection at institutional, national and European levels must be improved. This concerns data on mobility (including 'free movers' and full-degree mobility), employability (students' entry in the labour market and their career development over several years), student-staff ratios at all degree levels, graduation and drop-out rates, time to degree, recognition of prior learning, and students' socio-economic backgrounds. In addition, given changing demographic trends, institutional analyses of staff data (by age, gender and status) are crucial in order to plan for the future.
30. Successful implementation of Bologna is partly conditional on the capacity of institutional leaders to bring institutional coherence to a multi-dimensional change agenda, and to explain, persuade and motivate staff members, and students. Therefore, emphasis should be placed on institutional responsibility in the further

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implementation of the Bologna Process and HEIs should have considerable scope in implementing the change agenda, which they must be able to relate to their specific mission and objectives, thereby respecting institutional diversity.

31. The success of Bologna has hinged on the involvement of all actors, including students and institutions, in policy discussions. This *modus operandi* at the European level must continue and be strengthened at the national and institutional levels in order to meet the ambitious objectives set for Europe.

PART III: A FOUR-POINT AGENDA FOR THE EHEA

32. The report shows that European higher education institutions have changed in deep and significant ways in response to international trends and European policies, including the Bologna Process, which was examined through the prism of student-centred learning and the imperatives of ensuring both social cohesion and quality. Part III proposes a set of future policy priorities for the EHEA, based on the preceding analysis.
33. Institutional strategic orientations and European and national higher education policies would be enormously helped if they are framed within a broad vision of the society of the future and of its educated citizens. This would help institutions to exploit fully the link between the different elements of the Bologna Process and to engage in the required curricular and pedagogical renewal that the shift to student-centred learning entails – a renewal that must be cast within a lifelong learning perspective, and with the goals of widening and increasing access.
34. Quality has been at the heart of the Bologna Process as demonstrated by institutional quality developments. The European Standards and Guidelines (ESGs) were developed to support diversity across – and within – 46 countries while adhering to unifying principles and values. These common ‘standards’ are framed in such a way as to promote quality levels through the central role of HEIs. The current stress on indicators in the Bologna Process should not overshadow the importance of keeping a balance between accountability and improvement, quality measurement and quality assurance, and a thoughtful articulation between what needs to be done internally (at the level of institutions) and externally (by governmental or quasi-governmental agencies).
35. The Bologna Process has had multiple and positive impacts on European higher education identity within Europe and beyond. The growing European identity in the world – while strong at policy level – still seems to leave practical aspects of institutional behaviour unaffected. There is little joint European cooperation outside Europe, with each European country pursuing its own internationalisation strategy despite the “Global dimension strategy” adopted at the 2007 Bologna Ministerial meeting. In addition, the question as to whether European cooperation will not be diluted in internationalisation will require monitoring in future years.
36. Both the EHEA and the ERA create opportunities and responsibilities for European HEIs. It will be important to strengthen the links between the European higher education and research areas to enhance one of the singular strengths of European higher education – the unique role of universities in ensuring a close interface between education, research and innovation. To meet these objectives EUA will also continue to advocate for closer links between the EHEA and the ERA and thus for a European Knowledge Area crucial for universities to be able to educate graduates equipped with the high level skills Europe needs for the knowledge societies of the 21st Century.